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MEETING THE CHALLENGE

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An Education Roundtable Workbook

1993

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TABLE OF CONTENTS

PAGE #

WELCOME 2

INTRODUCTION 3

THE ROUNDTABLE PROCESS 4

DEFINING A BASIC EDUCATION 5

FUNDING EDUCATION IN ALBERTA 13

MEASURING RESULTS IN EDUCATION 21

CHANGING THE DELIVERY OF EDUCATION 30

"LET US NOT GO OVER OLD GROUNDS. LET US RATHER PREPARE FOR WHAT IS TO COME."

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October, 1993

Education is important to Albertans. Quality education will serve as the foundation for our province's future economic health and prosperity.

As a government, we are committed to maintaining education as one of our key priorities. At the same time, we must recognize the fiscal reality in Alberta today.

Our government has promised the elimination of our provincial deficit in four years. Achieving this objective will require significant reductions in government spending. All sectors of government expenditure, including education, will be called upon to assume a share of the responsibility in that deficit elimination.

The challenge then, is to find ways to improve the quality of education in times of reduced government spending. This requires finding new approaches to delivering education in this province, approaches that are more efficient and effective than those of today. We must better meet the changing needs of Alberta students and spend less money doing it.

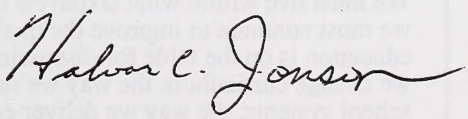
A second commitment of our government is to consult with Albertans. The Basic Education Roundtables provide an opportunity for that consultation. They are a forum for discussion of the issues facing education and development of concrete recommendations on how to deal with those issues.

This workbook attempts to define some of the most significant issues challenging education, provides some information on those issues, and raises key questions that must be answered to achieve our goal of quality education at a cost our province can afford.

Whether you are using this workbook as a participant in one of the roundtables or to prepare a written submission to the government, I look forward to receiving your comments and recommendations. They will play an integral part in the development of the future directions for our education system.

Thank you for your participation and your commitment to education in Alberta.

Yours sincerely,



Halvar C. Jonson

Minister of Education

THE ISSUES

"We must be concerned with getting value for money, not just with controlling expenditures. We will...work with our partners to improve productivity in delivering health, education, and other services." May Budget Address.

Alberta's Balanced Budget Plan calls for a reduction of 20%, or nearly $2.5 billion, in government spending by 1996-97. Education is responsible for 14.2% of the province's program spending and will be called upon to make a contribution to the deficit reduction. A 20% decrease in the budget for education would reduce funds by almost $369 million over a three year period. In addition, the need to find $200 million in fixed costs for contributions to the Teacher's Retirement Fund, capital construction, and enrolment increases must be addressed.

Alberta's Budget Expenditures

(Estimated $13.408 Billion in 1993/94)

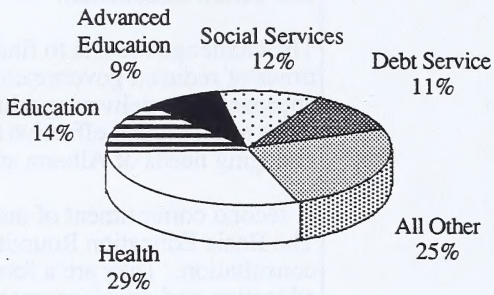


Figure 1

You are asked to bear in mind Alberta's financial situation as we discuss four main issues facing education:

1. ***What should be offered to our students in a basic education?***
2. ***How should education be funded?***
3. ***How do we assess the results of our education system to ensure high quality, effectiveness, and efficiency?***
4. ***How should we deliver services to students?***

Each of the workbook sections deals with one of the four main issues outlined above. Background information is provided so that you understand what we now do. Some alternatives are suggested and then questions are asked to find out what you think should be done. The alternatives are **not "givens"**. Rather, they are to stimulate your thinking.

"Maintaining the status quo is not an option nor is tinkering with the existing system. Through the involvement of parents, students, business and community leaders, and the educators themselves, we can find lasting solutions and develop a fundamentally new approach to educating our youth." Tough Choices, March 1993.

We must live within what taxpayers can afford to pay. Yet we know that we must continue to improve the quality of education. All that we do in education is on the table for discussion: the way we do business; the way we change curriculum; the way we organize and administer schools and school systems; the way we deliver education to students in the classroom; and how we coordinate the delivery of health and social services in our schools.

THE REVIEW PROCESS

ROUNDTABLE MEETINGS
Meetings in Edmonton & Calgary with all stakeholders represented

RESULTS OF DISCUSSIONS
Establish directions for education, identify actions to be taken, and produce recommendations

RECOMMENDATIONS CONSIDERED FOR ALBERTA EDUCATION BUSINESS PLAN

REPORT TO GOVERNMENT
Recommendations presented to government for inclusion in Budget 94

BACKGROUND

Roundtable discussions have been initiated by the Alberta Government in a number of critical areas, most notably health, finance, and now education. In the May budget address, the Honourable Jim Dinning, Provincial Treasurer, stressed the importance of government setting clear priorities to assist in fiscal planning and then sticking to those priorities. The Budget address also identified how this priority process would be structured and the broad areas to be addressed.

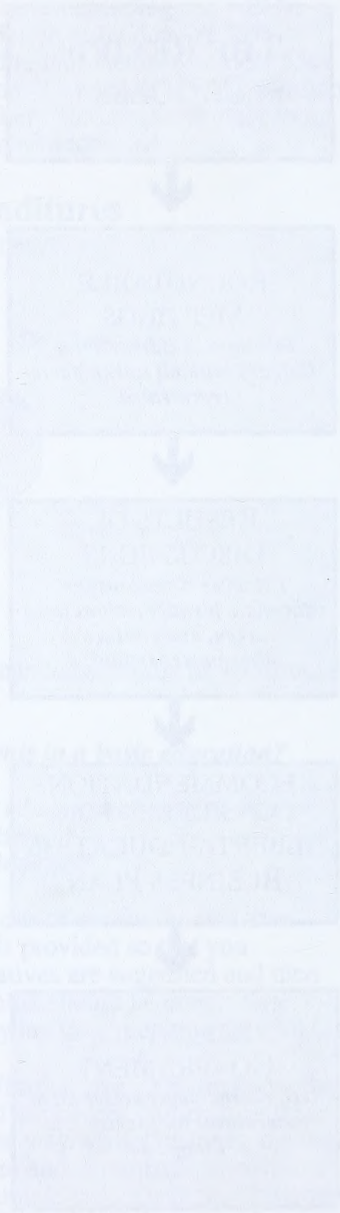
In education, the limited resources, growing expectations, and the need for innovation are realities affecting students and teachers in today's classrooms. We must address these issues so that long term directions can be developed for education. We need better cooperation and coordination between and among government agencies, parents, community members, school boards, teachers, and the private sector.

This Roundtable discussion will establish new directions for education and identify actions which must be taken to achieve those new directions.

"A clear sense of direction for education is needed to make the best budget decisions at both the provincial and school board level."
Tough Choices: A Progress Report, Spring 1993.

"Roundtables will report their recommendations this fall. Actions from these recommendations will be included in the 1994 Budget."
May 1993 Budget Address.

". . . we will work with Albertans to find new ways of doing business, improving the cost-effectiveness of programs, encouraging innovations and creativity, and establishing new partnerships."
May 1993 Budget Address.



ISSUE # 1

DEFINING A BASIC EDUCATION

What is a basic education in Alberta?

OBJECTIVES

"We must improve the quality of education we provide students. Education continues to be a priority of the Alberta government. The province recognizes that an excellent education system is essential for the future success and well-being of our young people and for the continued development and prosperity of our society and economy." Tough Choices: A Progress Report, Spring 1993.

TO make recommendations as to
(a) what a basic education should/must include.
(b) what a basic education should not include.

TO identify a provincially mandated program of basic education which must be delivered by school jurisdictions.

To have you identify ways in which your definition of basic education will affect the funding, delivery, and measurement of education.

TO have participants identify implications of the components of a definition for basic education for students, parents, schools, teachers, parents, and Albertans.

BACKGROUND INFORMATION: WHAT WE DO NOW

Introduction

A basic education program for most Alberta students today includes but is more than reading, writing, and arithmetic. Over the years, courses have expanded at all levels. For example, Early Childhood Services (ECS) or Kindergarten programs are now seen by many as an integral part of a child's school experience and career preparation courses are widely available. This section provides information on what is now provided as a basic education in Alberta.

The Basis of a "Basic Education"

The Goals of Education and the Goals of Schooling, approved by the Alberta Legislature in 1978, play a key role in determining a basic education and the programs and services provided by the province and school boards. Goals of Schooling identify areas of learning for which schools have a primary responsibility. The Goals of Education identify educational areas where responsibility is shared by the community.

The Purpose of a Basic Education

Through a basic education, students acquire the knowledge, skills, and attitudes they need to be self-reliant, responsible, caring, and active participants in society.

A basic education helps students achieve the formal Goals of Schooling and Education. The primary purpose of a basic education is to foster intellectual development and equip all students to be lifelong learners.

The basic education an individual gains through schooling is supported and extended by the individual, the family, and the larger community. These extensions may include developing knowledge, skills, and attitudes for recreational and cultural pursuits, a vocation, or social and behavioral attributes.

The "How" of a Basic Education

To provide direction to schools, Alberta Education sets out what students are expected to learn through Programs of Study (curriculum). These Programs of Study show the knowledge, skills, and attitudes necessary to achieve the Goals of Schooling.

School boards are responsible for making available to students the courses, Programs of Study, instructional time, and the materials they need to achieve expectations. Currently, 1000 hours are needed at the high school level and 950 hours at the elementary and junior high levels each year to complete a program.

School boards provide basic education services in schools, through distance education, or in cooperation with other school systems, parents, post-secondary institutions, business and industry, and community groups.

Going Beyond a Basic Education

Schools, in cooperation with parents and the community often provide a number of additional programs and services. These programs and services may help students gain a basic education and meet the Goals of Education. These programs may include:

Participants in the Fiscal Realities sessions in the fall of 1992 provided "other comments on funding which included defining and funding a basic education." Tough Choices: A Progress Report, Spring 1993.

- Programs of choice such as instruction in languages other than English (examples include French immersion programs, bilingual programs in Ukrainian or German).
- Programs of choice and instructional time beyond that needed to attain a basic education. These include drama and second languages in elementary school, complementary courses such as Career and Technology Studies, fine arts and second languages beyond those needed to meet requirements for junior and senior high school, and the Integrated Occupational Program for Grades 8 through 12.
- Alternative programs which focus on the culture/language of one group of students or a particular teaching philosophy.
- Locally developed courses such as the Registered Apprenticeship Program, International Baccalaureate, Advanced Placement, geology, Asia Pacific Rim Studies, fine arts, and second languages.
- Duplicate programs (i.e., programs also offered by post-secondary institutions).
- Extended programs for children with special needs, and children below compulsory school age.
- Extended personal guidance and counseling.
- Extra-curricular activities and services (for example, sports and field trips).
- Transportation beyond what is required for a basic education (e.g., field trips).
- Medical services including optical, dental, physiotherapy, speech therapy, psychological and psychiatric services, and administering medication.
- Before and after school care programs.
- Hot lunch programs.

Education is a significant part of building a strong social and economic future for Alberta. Schools have increasingly been asked to provide a broader spectrum of school-based programs and services to meet the needs of children. Reduced resources will make it difficult to meet those demands. Priorities must be established without compromising the quality of education. To establish these priorities we must closely examine what we offer in a basic education within the limits of reduced spending.

WHAT A BASIC EDUCATION MIGHT BE

Introduction

"Basic education" must be examined to achieve efficiencies. In this section, a revised "basic education" is presented. You will note major differences in this new "basic education" from what has been offered in our schools and as described in the previous section. When you discuss the scenario, please think about its potential impact on funding, delivery of services, and measurement of results. Please remember this is only one alternative and should not be considered the only option possible.

The Purpose of Basic Education

A basic education should provide students with the skills and knowledge to become self-reliant, caring, responsible contributing members of society. The school's main responsibility will be to ensure that students

- understand the rights and fulfill the responsibilities of citizenship, and
- have the skills and disposition to pursue learning actively throughout life.

The Right to a Basic Education (Education Entitlement)

Students would be provided twelve years of basic education. There would be two parts, which are <u>not</u> mutually exclusive, to this entitlement:

- (1) The "Foundation" Program, the requirements of which all students must meet; and
- (2) The Career Preparation Program which would provide students with opportunities to extend their development to meet the specific requirements for entry into post-secondary institutions and/or the world of work.

The "Foundation" Program would consist of basic and essential knowledge, skills, and attitudes which all students will gain and demonstrate through measurable outcomes. The Career Preparation Program would be started after the requirements of the "Foundation Program" have been met and demonstrated, and if the twelve years of basic entitlement have not been completely used.

The "Basic" or Foundation Program

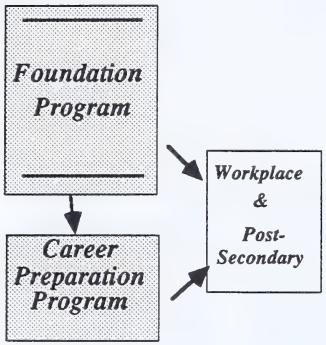


Figure 2

The schools' first obligation is to ensure students receive a thorough base in reading, writing and mathematics. The Foundation program would enable students to:

- Read for information, ideas, understanding, and enjoyment.
- Communicate clearly and accurately using written and oral language and graphical representations.
- Use mathematics in dealing with economic, social and scientific situations related to their life experience.
- Understand the physical world, the ecology and diversity of life, the social context of science and technology, and the methods of scientific investigation.
- Know the history and geography of Canada and have a general understanding of world history and geography.
- Understand the major Canadian political, social, historical and economic institutions in a world context.
- Understand and respect the cultural diversity of Canada and appreciate the role of literature and the arts in culture.
- Know the basic requirements of an active, healthy life-style.
- Recognize the importance of accepting responsibility for their physical, spiritual and emotional well-being and appreciate the role of the family and other relationships in maintaining that well-being.
- Explore an issue, evaluate the quality of source material, and take a position based on research.
- Manage time, physical, and financial resources needed to complete diverse tasks and select and use appropriate computer and communication technology.
- Know how to work independently and cooperatively with others.
- Evaluate their own endeavors and continually strive to improve the quality of their performance.

In setting standards, the government would further define expected outcomes for the learnings through public consultations and in reference to Canada-wide standards. At least 90% of students would be expected to acquire fully each of these learnings before they complete their schooling. Provincial standards would be defined in terms of national standards in areas where they exist.

Schools might provide the opportunity for students to learn a second language. When the main language of instruction is not English, students must be able to show ability in reading and writing English.

Further Preparation for Careers and Post-secondary Institutions

Students who finish the "Foundation Learnings" use their remaining educational years for "Career Preparation". Schools would help students meet the additional requirements for entry into post-secondary institutions and/or undertake a program of work experience and skill training aimed at direct entry into the world of work.

Educational Delivery

Schools would provide students with the opportunity of at least 950 hours of instruction each year. Year I of the Basic Education Program (Foundation Program) must be at least 875 hours and instruction should concentrate on providing a strong base in reading, writing, and arithmetic.

Schools would be encouraged to provide alternatives such as distance education, home study and work-place learning opportunities so that students can choose to learn in different ways--ways that more closely relate to how the learnings are put into practice in adult life and that help the students take responsibility for their own learning. These alternatives would be especially appropriate for the Career Preparation Program.

Wherever possible, courses provided in the Career Preparation Program should be comparable with those offered in post-secondary institutions or as part of an apprenticeship training so that credits can be transferred and duplication is reduced.

PROGRAMS NOT FORMING A PART OF A BASIC EDUCATION BUT WHICH COULD BE SUPPORTED LOCALLY: AN OPTION FOR CONSIDERATION

Specific programs and services that would not be part of the main purpose of schools could be provided locally by school boards through local taxation, in partnership with other organizations, or fully by agencies, private industry, or community groups. These include:

Programs

- Early Childhood Services (Kindergarten).
- Fine arts (as specific areas of study of special interest to individual students or the local community).
- Competitive sports.
- Physical fitness.
- Driver training, hunter training, first aid.
- Religious education.
- Work experience.
- All locally-developed courses (e.g. Registered Apprenticeship Programs, Cultures and Second Languages, Advanced Placement, International Baccalaureate Program).
- Career and Life Management.
- Health and Personal Development.
- Head Start.

Services

- Care giving, medical treatment for special needs students.
- Speech and hearing therapy.
- Family counseling.
- Hot lunch programs.
- Field trips, sports days, Christmas concerts, holiday celebrations (all other similar school activities that are not specifically designed to achieve basic learning).
- Professional development for teachers.

QUESTIONS:

1.1 What is your definition of a basic education?

1.2 What could be/should be removed from what may now be seen as a basic education?

1.3 How could your definition of "basic education" reduce the cost of education? How would the definition affect the delivery of education?

1.4 What is the responsibility of schools in providing education to students? What are the responsibilities of others?

1.5 Whose role is it to provide programs not forming a part of basic education? Who should pay for the program?

Notes:

ISSUE # 2

FUNDING EDUCATION IN ALBERTA

What should be the funding priorities in education and how should we meet those priorities?

OBJECTIVES

Provincial grants to school boards increased by 29% between 1987/88 and 1991/92 and school board spending increased by 32% during that same period.

TO have you identify ways to reduce the costs of education.

TO have you suggest ways by which resource allocations and expenditure can achieve the maximum benefit.

TO have you identify funding priorities for education.

In the 1992-93 school year, 534,399 students (20% of Alberta's population) attended 1953 schools.

TO have you identify ways to have fiscal equity among school jurisdictions.

BACKGROUND INFORMATION

Present Funding Arrangement

In 1991/92, operating boards spent 63.2% of their total operating expenditures on salaries and benefits for certificated and non-certificated instructional staff. An additional 9.6% was spent on salaries and benefits for non-instructional staff (secretaries, non-certificated administrative staff, janitors, maintenance, bus drivers).

The funding of education in Alberta is divided between locally elected school boards and the provincial government. School boards are responsible for a part of education costs by collecting taxes on residential and non-residential property. The province obtains funding from a tax on non-residential (i.e., industrial and commercial) property and from funds in the general revenue account.

There are few limits on school boards to tax locally. Each year local boards determine the amount they need to support their share of the costs of local school programs. They requisition the tax revenue from the municipalities. Revenues from local property taxes are on average 45% of the total funding for education. However, some areas can raise more than $2,800 per student per mill of tax while others can only raise $52 per student per mill.

The tax rate is expressed as a "mill rate". A mill is one dollar of tax revenue for every $1,000 of assessment.

THE GRANT SYSTEM

Basic Grants

Approximately 75% of provincial funding to schools is distributed through the School Foundation Program Fund (SFPF) which is funded by the general revenues of the province and a tax on non-residential property. The SFPF provides support for three programs: (1) basic per pupil instruction grants; (2) student transportation grants; and (3) school capital or debt retirement.

Equity Grants

The province has a number of Equity Grant programs for school jurisdictions having factors beyond their control which affect educational opportunities for students. The Fiscal Equity Grant is provided to school jurisdictions to reduce the effects that differences in available resources have in providing services for students. The grant addresses differences in fiscal capacity (i.e., assessment per pupil), scarcity (i.e., student population and area), and distance (i.e., distance away from a major supply centre). In 1993/94, the equity grant totals $98 million (including a $30 million one-time use of lottery dividends).

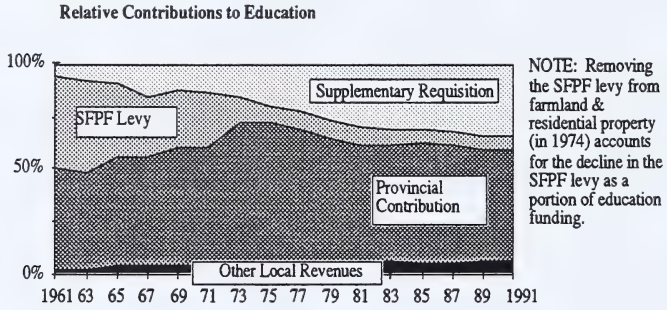

Relative Contributions to Education
100%
50%
0%
Supplementary Requisition
SFPF Levy
Provincial Contribution
Other Local Revenues
1961 63 65 67 69 71 73 75 77 79 81 83 85 87 89 1991
NOTE: Removing the SFPF levy from farmland & residential property (in 1974) accounts for the decline in the SFPF levy as a portion of education funding.

Figure 3

Special Education Grants

The province also provides special education grants on a per pupil basis. These grants are used to assess and place students with special needs in specific programs or to adapt regular school programs to accommodate exceptional students. Grants are paid on a resident pupil basis (i.e., students living in the jurisdiction) rather than on the number of students enrolled. This is done to ensure that school jurisdictions are responsible for the education of each student within the boundaries of the jurisdiction. School jurisdictions which have a higher number of students with special needs than the provincial average receive additional funding.

ECS (Kindergarten) Grant Funding is also provided for voluntary ECS programming offered by school jurisdictions and private ECS operators. It supports ECS programs and services that enhance individual abilities and future educational opportunities. ECS operators receive a basic instructional grant for each child between the ages of 4.5 and 5.5 years enrolled in an ECS program.

THE PROBLEMS IN FUNDING

Balancing What We Want With What We Have

During the past eight years, provincial spending has exceeded revenue. In 1992-93, this deficit amount was $2.1 billion.

The province's debt now stands at $29 billion; in 1992-93, 17 cents out of every dollar spent on programs was borrowed money.

Fiscal inequities across school jurisdictions in Alberta are growing and affect all aspects of education funding: net mill rates, assessment per student, and spending per student. Expenditures per student in 1991-92 ranged from a low of $3,500 in one area to a high of $20,200 in another, a difference of $16,700. The gap between school jurisdictions is increasing and continues despite the $68 million a year plus the $30 million one time allocation from lottery dividends that the province provided in equity funding.

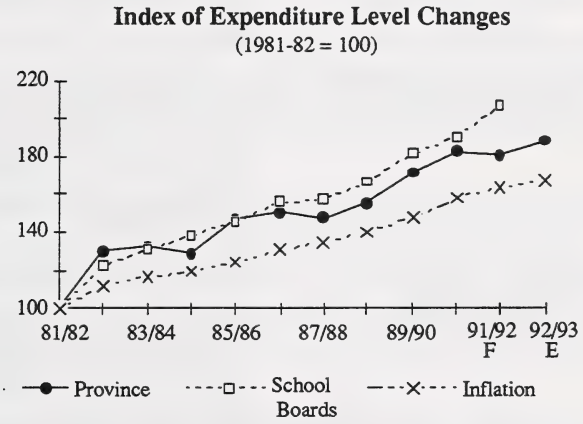


Figure 4

All students, regardless of the wealth of the community in which they live, their geographical location, their social, cultural, or economic background, have an equal right to a quality basic education. Inequitable funding may deny some students access to educational opportunities that are available to others.

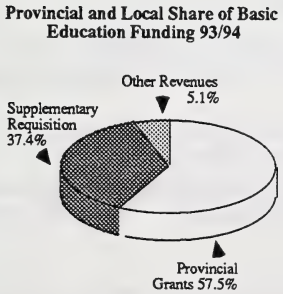

Provincial and Local Share of Basic Education Funding 93/94
Other Revenues 5.1%
Supplementary Requisition 37.4%
Provincial Grants 57.5%

Figure 5

Funding levels affect student opportunities, quality of education and achievement. Analysis has shown that at least 10% of Alberta students may be seriously disadvantaged because fiscal inequalities limit their access to a quality education and their opportunities to achieve.

In the fall of 1992, meetings were held with stakeholders across the province to discuss the impact of these fiscal realities upon education funding. In those discussions, members of the education community were asked to provide suggestions on how these realities could be addressed. Their suggestions ranged from minor changes to major restructuring of the system. However, participants frequently mentioned that any changes in funding must address the fiscal equity issue.

Limited provincial funding for education will make the fiscal inequities among school jurisdictions worse. Those areas with a large assessment will be able to raise more funds locally for education; those without will not be able to do so.

Financial Assistance To Schools

EDUCATIONAL FUNDING AND THE 1993-94 BUDGET

Addressing Student Enrolment Growth ($34 M)

- A 2.0% increase in enrolment is budgeted for the 1993-94 school year.
- The budget now reflects an anticipated $5 million in additional savings from the two count enrolment system.

Meeting the Grant Rate Commitment for 1993-94 ($16 M)

- Part of the grant rate increase of 3.0% in the 1992-93 school year (Sept. 1/92 to Aug. 31/93) must be picked up in the 1993-94 fiscal year.

Increasing Equity Funding for Less Wealthy Boards ($30 M)

- To address the problem of fiscal inequity and regional disparity among school jurisdictions, a special one-time only allocation of $30 million from provincial lottery revenues will be made to less wealthy school boards for the 1993-94 school year. This $30 million will be in addition to the $68 million in equity grants already provided from general revenues.

Increases to the Teachers' Retirement Fund ($26 M)

- Pension funding under the Teachers' Retirement Fund increased as the province now contributes half of the pension plan's current service costs instead of paying half of the plan's benefit payments. To eliminate the plan's unfunded liability, the government contribution rate is being phased upwards over a three-year period, ending in September, 1995.

Supporting increased Provincial Capital Debentures ($9 M)

- The new debenture issues under the 1991-95 Capital Plan have increased payments for retiring debentures used to build or renovate schools.

Recognizing Private School Needs ($3M)

- Private schools now receive the Special Education Block Grant for each student they educate. They will receive transitional funding in the form of a per student block grant in lieu of the following program grants: High Incidence, English as a Second Language, Vocational Education, Distance Learning and Other Languages.

Reducing Program and Transportation Grants ($21M)

- To improve efficiency, twenty-two specific program grants have been combined and reduced by 8% in 1993-94. Equity contingency grants will be eliminated.
- Transportation grants paid under the School Foundation Program Fund and for ECS children are being reduced by 10% in 1993-94.
- A 1.5% growth in the commercial and industrial property assessment base will increase the provincial levy by $4 million. The mill rate remains the same as in 1992.

1993-94 Net Funding Increase

- In 1993-94, the provincial government increased its overall education expenditures by $93 million.

SOME ALTERNATIVES

"Health, education, and social services make up about 70% of program expenditure. A balanced budget cannot be achieved unless savings are found in all program areas." May Budget Address.

Based on a 20% target for reduction, Alberta Education's share of the budget reduction target over 3 years would be $369 million. However, built in costs for enrolment increases, Teacher Retirement Fund contributions, and capital commitment total an additional $200 million.

How should the education system deal with this fiscal situation while still meeting student needs?

- Present funding is based on a 200 day school year but school systems often operate for 187.5 days. The average daily cost of education is $15 million. By basing payments on 187.5 actual days of instruction, $187 million could be saved. Should funding be based on actual instructional days?

- A reduction of 1% on the SFPF grants would account for $13 million or $22 per student. This reduction would impact all schools in Alberta, public, separate, and private. Should grants be reduced?

- A reduction of 1% in staff salaries would amount to a savings of $16.5 million plus $1.4 million in TRF support. Should salaries be rolled back?

- A 50% reduction in ECS funding would save $25.5 million in instruction grants, $3.5 million in transportation and $2.1 million in other grant programs. ECS is an optional program. Should ECS, a voluntary program, receive provincial financial support?

- At present, 14,000 students who are less than 6 years of age and 3,300 students who are more than 18 years of age attend school at a cost of $35.4 million. Should the province support schooling only for those students between 6 and 18 years of age?

- A freeze on capital projects (new construction and modernization) would save $10 million in 1994/95 and a further $5 million in 1995/96. Should all construction of new facilities be frozen?

- The elimination of special grant programs would save substantial dollars:
  - Distance Learning $4.4 million
  - Adult extension $10.7 million
  - Language Grants (French, ESL, other Languages) $11.7 million
  - Vocational Education $9.2 million

Should these special grants be "phased out"?

Educational Expenditures by Province per Student

Provinces	1992-93 Per Student Expenditure ($)	Rank
Canada	**6,507**	
Quebec	6,807	1
Manitoba	6,790	2
Ontario	6,739	3
British Columbia	6,725	4
Alberta	**5,683**	**5**
New Brunswick	5,668	6
Saskatchewan	5,664	7
Newfoundland	5,322	8
Nova Scotia	5,254	9
P.E.I.	5,054	10

Figure 6

QUESTIONS:

2.1 What should be the funding priorities in education?

2.2 Where would you suggest that funding reductions be made to meet education's share of the deficit reduction program?

2.3 What suggestions do you have to ensure school jurisdictions have reasonable access to equitable resources?

2.4 What efficiencies should be considered to maximize the use of fiscal resources?

2.5 What measures would you take to ensure the costs of education are reasonable and under control?

Notes:

ISSUE # 3

MEASURING RESULTS IN EDUCATION

How do we determine the quality of the education we provide?

OBJECTIVES

"We need to be accountable for the results we are obtaining with the tax dollars we are expending. As Minister, (I will) continue an emphasis on the performance of the education system. It is expected of us by parents and the general public and , I believe, by students." Halvar Jonson, Minister of Education, March, 1993.

TO develop an understanding of the need to identify performance measures that can be used by Alberta Education and school jurisdictions.

TO have you identify the most important measures to determine the overall quality of education.

TO have you identify advantages and disadvantages of various performance measures.

BACKGROUND INFORMATION

Results Reporting

In 1984, Alberta Education was the first government department to adopt a results-based orientation.

"The education system is certainly large in terms of inputs; the sheer size of the education and training systems would justify an examination of their effectiveness." Economic Council of Canada, 1992.

In *Vision for the nineties...a plan of action*, the government made a commitment to Albertans to provide regular reports on the progress made by Alberta's education system in achieving excellence. *Achieving the Vision 1991* was the first annual reporting to Albertans of the performance of the education system in each of the 13 priority areas of the *Vision for the nineties...a plan of action.*

What The Results Reports Show

The 1991 report showed that Alberta's education system was based on a solid foundation and it identified areas where more work was needed. *Achieving the Vision 1992* was released in April, 1993. As in 1991, a rating of B- was assigned to the education system. Gains were made in science programs, improved and expanded partnerships, excellence in schools, and reducing the dropout rate. Basic skills declined slightly, and inequities in school jurisdiction tax revenue became worse.

Work has begun on *Report 1993*. This report will be an integral component of Alberta Education's three year business plan and will be released in the spring of 1994.

Purposes Of Results Reporting

Results reporting serves two purposes. The first is accountability: Reporting lets Albertans know how well we are doing in key areas of education and gives solid information about our progress, our strengths, and weaknesses. The second purpose is to help focus energies in areas where improvements are needed.

Measuring How Well We Do

"Traditional bureaucratic governments focus on inputs rather than outcomes [and, as a consequence] pay little attention to results." Osborne & Gaebler, 1992, Reinventing Government.

The annual results reports are important. They document improvements and reporting to the public. Information for the reports is gathered from a wide variety of sources. For example, parents, teachers, students, post-secondary instructors, trustees, employers, and superintendents are surveyed to gather their perceptions on the performance of the system. Other information, particularly from the results of the Achievement Tests and Diploma Examinations, is carefully analyzed by school jurisdictions and Alberta Education to make sure that standards are being met. Alberta also participates in international testing in the areas of science and mathematics.

The province evaluates the results attained through Achievement Tests in Grades 3, 6, and 9 and through Diploma Examinations in Grade 12. It has established, and continues to refine performance standards so that teachers, students, parents, and other Albertans know what outcomes are expected.

THE NEW REALITIES IN ACCOUNTABILITY

Introduction

There is a perception that, in spite of increased educational expenditures on education, student achievement could be better and that value for dollars is not being realized. The public has voiced an increasing demand for improved standards and accountability and for teachers to focus on students mastering basic skills. Recent survey data and opinions from major organizations support this view:

Why We Need Better Results

"Accountability is a process which involves the duty both of individuals and the organization of which they are part, to render periodically accounts for tasks performed, to a body having both the power and authority to modify that performance by the use of sanction or reward." Kirst, 1990, Accountability.

"It's clear that we must continue to focus on improved student learning as we deal with fiscal restraint." Tough Choices: A Progress Report, Spring 1993.

- In 1989, Statistics Canada reported, based on its *Survey of Literacy Skills,* that more than 28% of the 16-24 age group fell below the everyday reading level and that 44% fell short of the mathematics requirements.
- The Economic Council of Canada (1992) commented that because the education system operates almost exclusively on public funds, "the major policy concern in the future will be whether society can maintain and enhance both the accessibility and quality of the education system without making excessive claims on economic resources."
- The Conference Board of Canada (1992) commented on the results of a survey done by the Canadian Education Association in 1990: "Only 45% of those surveyed assign to the school of their community an A or B grade compared to 59% in 1979. A declining proportion of people regard their schools as very good while an increasing number see them as mediocre or worse (55% in 1990, up from 41% in 1979)."
- Alberta Education surveys for the 1992 results report showed that "a majority of high school graduates, superintendents, and trustees surveyed, and slightly less than a majority of parents, said the schools in their community rated a grade of B. Teachers tended to rate schools with a Grade of A.

"Until now, it has been difficult to say anything definitive about the output of the education system. There is a general tendency to measure the system by its inputs, but there has been little systematic effort to evaluate actual performance--the achievement of people leaving the system." Economic Council of Canada, 1992.

- Half of the post-secondary instructors surveyed in 1992 gave Alberta high schools a grade of C for effectively preparing graduates for entry to their institution; 20% of the group gave schools a mark of B while another 20% gave schools a mark of D.
- In 1992 surveys, 40% of the parents who were surveyed said that education had become worse in the last five years; on a similar survey in 1991, 18% of the respondents believed that education had become worse over the last 5 years.

Confirming New Directions

- Changes are occurring in education to ensure a higher quality of outcomes. In the past, education was thought of as process and system. Improvements meant trying harder, investing more money and giving more services. Now, education is the result achieved; the learning which takes place when the process has been effective and efficient. Only if the process succeeds and learning occurs can it be said that education happened. To accurately determine if education happened (i.e., determining the quality of education), three things need to occur: indicators must be developed for key areas in which assessment of results is necessary; standards need to be developed for those key areas; and methods of measuring must be chosen.

Performance Indicators

- Indicators provide statistical information about certain conditions in the education system so that we can better assess its "health". They let us know which critical areas performed satisfactorily and which areas require improvement. To accomplish this, the indicators must be based on the essential goals, objectives, values, and vision of the education system.

Performance Standards

- Standards are based on a belief that in core areas, all students must reach a level of mastery to enable them to apply what they know, to reason, and to solve real-world problems. All children must have access to learning and learning opportunities. Students must also achieve at certain levels as they pursue their education.
- Standards must reflect what is desirable, or ought to be, in areas such as curriculum content, school delivery, instruction, and assessment.
- Students are held accountable for mastering knowledge and schools are held accountable for providing students with the opportunity to learn.

Performance Measures

- Measurement is necessary to determine to what extent standards have been met. Measuring can be done, for example, through the use of tests and surveys to determine achievement and satisfaction.

HOW WILL WE MEASURE RESULTS?

Alberta Education has recently developed a series of draft performance indicators and measures to assess the quality of education in the province. They should give us a picture of how well we are doing but not why a result is not achieved.

Some important questions are asked about results and draft measures are suggested to answer the questions. We cannot measure and report on everything, therefore choices have to be made. These selected questions and measures, together could give us a picture of how well we are doing. Others should also be considered.

Does Alberta set high enough learning standards?

Measures

- Comparison of learning standards in the Alberta curriculum in reading, mathematics and science with the standards in other provinces and countries.
- Perceptions of post-secondary institutions about the graduating standards for high school graduates.
- Assessment of the learning standards by a third party advisory group.

Do enough students achieve the standards established in the provincial curriculum?

Measures

- Percent of grade 9 students who graduate from academic and occupational courses/programs in four years.
- Percent of students who achieve an acceptable or higher standard on grade 3, 6 and 9 provincial tests.
- Diploma Examination results in Grade 12.
- Rutherford Scholarship results.

Are students receiving the education they need to prepare them for entry into post-secondary education and the world of work? Is their education appropriate and relevant?

Measures

- Students' satisfaction levels with preparation for post-secondary or the world of work.
- Parental satisfaction levels.
- Post-secondary instructor satisfaction levels with entry level skills of graduates.
- Employer satisfaction levels with students who have completed high school.

Do Alberta students perform favorably compared to students outside the province?

Measures

- The performance of Alberta students compared to students in other provinces in reading, mathematics and science.
- The performance of Alberta students compared to other students in their countries on international tests in mathematics and science.
- Scores achieved by Alberta students in the International Baccalaureate Program compared to world averages.

Are students with special educational needs being well served?

Measures

- Student and parent perceptions about how well the needs of disabled students are being met in various integrated and non-integrated situations.
- Number of appeals.
- Cost-effectiveness of programs for disabled students.
- Number and cost per day of special education students.

Are school jurisdictions providing a safe and secure learning environment that encourages students' learning ?

Measures

- Student perceptions that teachers, school facilities, and the school administration and trustees encourage, support and reward their learning efforts and accomplishments.
- Rate of reported student violence in schools.
- Students are clear about the learning expectations and standards.
- The use of technology to support student learning.
- Innovative approaches to structuring the learning environment.

Are the costs of basic education reasonable and under control?

Measures

- Statement of expenditures compared to provincial targets for education.
- Comparison of rates of expenditure increases in basic education to post-secondary education and municipal rates of expenditures; and to annual inflation rates.
- Interprovincial comparisons:
  - per pupil expenditures
  - per pupil expenditures - as percentage of Gross Domestic Product.
- Costs per student (annual and per day) compared to post-secondary and other institutions.

Do school jurisdictions have equitable access to fiscal resources?

Measures

- Per pupil expenditures among school jurisdictions.
- Capacity of local mill rate; fiscal capacity among school jurisdictions.

Are school jurisdictions well managed?

Measures

- The existence of a 3 year Business Plan, performance measures, and reporting mechanisms to the public.
- Percent of total provincial and local expenditures for instruction (instructional focus).
- Transportation cost per student.
- Comparative infrastructure costs.
- Costs per day per class.
- Comprehensive audits to determine effectiveness and efficiency of school jurisdiction operations.

Do parents have adequate choice in the selection of schools/educational environments for their children? Do business and the community have an adequate voice in educational decisions?

Measures

- Degree of parental choice permitted by provincial rules and regulations.
- Degree of existence of 'open boundary' and other parental choice mechanisms.
- Number, type and perceived effectiveness of partnerships with parents (e.g. School Councils), business and the community

Is the role of Alberta Education clear and appropriate, and are its operations well managed?

Measures

- Percent of regulations that have been streamlined, eliminated, or added.
- Cost per student to administer provincial diploma exams.
- Demonstrated 5% annual increase in productivity .
- The roles of Alberta Education and school jurisdictions are well defined and understood.
- Percentage of total budget on administration.

QUESTIONS:

3.1 Are the suggested measures on pages 25-27 the right ones? What measures would you use to determine how effective and efficient our education system is?

3.2 How should we determine if students are receiving the education they need to prepare them for the world of work and post-secondary education?

3.3 How important is it to report to the public on the health of the education system? What are your suggestions as to how reporting could be improved? How can we get maximum use from the information in the results reports?

3.4 What are your suggestions for linking school jurisdiction reporting to reporting on a provincial basis? In what ways should school jurisdictions use the same performance measures as Alberta Education?

3.5 What actions should be taken if results in school jurisdictions do not meet the standards set by the province?

Notes:

ISSUE # 4

CHANGING THE DELIVERY OF EDUCATION

What changes are needed in education to meet the needs of students in a time of reduced spending?

OBJECTIVES

"In very simple terms, we all need to work together to look to fundamentally new solutions in this era of change and restraint, solutions which require creativity, more energy, and more cooperation." Halvar Jonson, Minister of Education, March, 1993.

TO have you use the information from the previous three sections as the basis for discussions about change in the education delivery system.

TO have you identify barriers to changing the delivery of education.

TO have you identify priority areas in the existing education system that can be changed in the context of reduced spending.

TO determine your suggestions for innovative approaches to the delivery of education.

BACKGROUND INFORMATION

"Maintaining the status quo is not an option nor is tinkering with the existing system. Through the involvement of parents, students, business and community leaders, and the educators themselves, we can find lasting solutions and develop a fundamentally new approach to educating our youth." Tough Choices, March 1993.

The delivery of education is influenced by how the education system is governed, ideas of accountability and autonomy, the idea that more programming should be offered to meet changing needs, how we define what should be taught, and the roles and responsibilities held by different partners in the educational system. History plays a part in shaping the delivery of education because we relate what we do and want to do with what was most comfortable in the past.

However, times change. Parents in the past trusted the teachers and principals, school officials, and government to provide quality education to their children but now want an increased voice in education.

"We must continue to develop a unique education system that reflects the society we live in and meets our standards of excellence both as a province and a nation." Halvar Jonson, Minister of Education, March, 1993.

A 1993 report in Ontario showed that 80% of the Ontario public supported increased involvement of parents in running the schools. The authors of the report commented that "the most striking pattern [in the research] is the very high consensus across all social groups on the increased involvement of parents in running the schools."

HOW WE DELIVER EDUCATION TODAY

Governance of Education

Alberta presently has 147 school boards with approximately 950 trustees, of whom 200 are also county councillors. Of the 147 school boards, 142 are operating boards and 5 are non-operating (i.e., they do not operate schools but send students to nearby jurisdictions) in the remote areas of the province. On August 31, 1993, the Minister amalgamated 35 non-operating boards with nearby operating school jurisdictions. Almost half of the school boards in Alberta enroll fewer than 1000 students each.

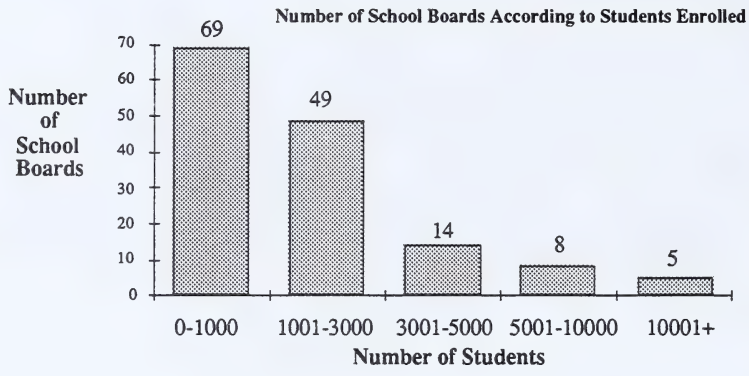


Figure 7

Each school jurisdiction has its own administration, develops its own policies consistent with broad guidelines established by the province and the School Act, develops its own budget, levies taxes, hires teachers and other staff, and provides educational services to students.

School boards are responsible for implementing Programs of Study, monitoring results, and the expenditure of provincial grants and local tax revenue. School boards are given provincial grants provided policies are in place to ensure that the funds expended are achieving the intended results. School boards have considerable local independence in meeting student needs.

Parent Involvement in Schools

The School Act (1990) requires each school principal seek to establish a school council and boards to develop a policy to outline the power of local school councils. The legislation allows for significant powers to be delegated to the school councils but most boards have them act in an advisory capacity to the school and the school board.

Regulations for Education

Recently, Alberta Education, in consultation with affected parties, reviewed its regulations, policies, practices, and procedures which could get in the way of school systems meeting the needs of students. The intent of the exercise was to improve efficiency and decision-making in education. The consultation found that provincial regulations in education were few because of the policy approach adopted by Alberta Education in 1984.

Areas identified for potential over-regulation included the student appeals process, rural transportation, equity and ECS Grants, and capital funding.

Areas identified as needing clarification or further review included home education, definition of independent students, penalties for not complying with the School Act, the mandate of the Board of Reference in termination of teacher contracts versus the role of the civil courts, and linkages with other government departments providing services to school-age children.

Ensuring Results

Alberta Education reviews results of the Grade 12 Diploma Examinations and Achievement Tests for Grades 3, 6, and 9 yearly. Various evaluation polices require school jurisdictions to evaluate students, teachers, school systems, schools, and programs on a regular and systematic basis.

School systems also are required to publish an annual report which outlines success, progress, and future directions. There is no requirement for school systems to use provincial measures to assess their own programs, schools, or services. There are no provincial school inspectors to make sure that the providers of educational services comply with provincial expectations.

Services to Children

Elementary schools are organized with students assigned to specific classrooms, often with one teacher in charge of 20-30 pupils. Teachers tend to be generalists and teach many subjects. Some specialist teachers for music, library, physical education, counselling and special needs may be hired, depending upon school size and finances.

"The key question is whether the structure we have in place now is the best way of ensuring that students get what they need: the best possible education at reasonable cost." May, 1993 Budget Address

In junior and senior high schools, specialist teachers are the norm and students typically move to the room in which the specialist teacher is located. Time requirements are in place for all subject areas and achievement standards vary from class to class, school to school, and system to system. Students cannot move to the next highest level until they have completed a series of pre-requisite courses (i.e., before a student can take Math 20, the student must have taken Math 10). There is an attempt to have small class sizes in the belief that smaller classes help student learning. Alberta's average pupil-teacher ratio has decreased from 18.2:1 in 1981-82 to 16.9:1 in 1990-91.

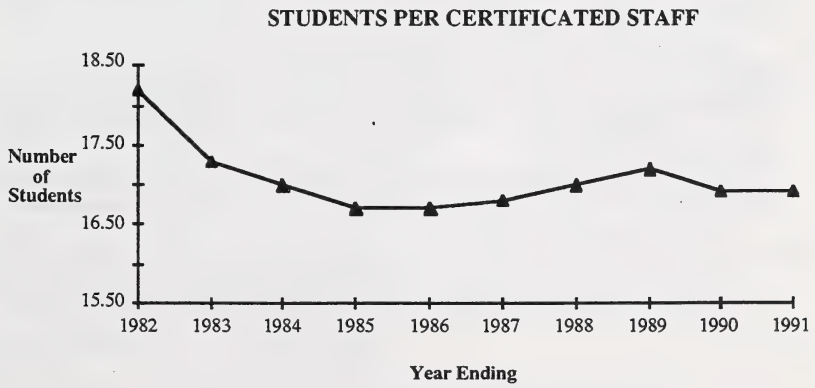


Figure 8

A "basic education" has grown to include much more than knowledge, skills, and attitudes in a limited number of subject areas. In many instances, schools provide job training courses, specialized academic programs, second language immersion, second language training, and fine arts programs.

Programs are many and varied and schools and teachers have been called upon to take on roles formerly carried out by the family, church, and community. Sex education, money management, counselling, and the treatment of social problems are found in today's schools. Teachers are called upon increasingly to deal with severe behaviour problems and violence in the schools.

In addition, schools provide services such as before and after school care, pre-school developmental programs, placement of special needs students in the regular classroom, and specialized programs to meet the diverse needs of children.

At the present time, coordination of services to children by government agencies is based on a 30 year old model designed to deliver only a few needed services. As a result, delivery of services to children is often fragmented or duplicated. More important, the new problems facing children today are more complex and require services from many government agencies, departments, and programs.

ALTERNATIVE DELIVERY STRATEGIES

Identifying Goals and Responsibilities

There is a need to restructure the education system and the manner in which it is governed. We must have an efficient and cost-effective system if available resources are to be spent on improving the quality of education service and outcomes for students. This can be accomplished by setting goals and responsibilities for the provincial government, school boards, parents, and students. Each level must provide leadership.

Suggestions for Change from the Fiscal Realities Sessions

The Fiscal Realities meetings involving over 300 members of the educational community in the fall of 1992 provided some ideas about restructuring the delivery of education in Alberta. These suggestions were made by the participants themselves and have been reported in *Tough Choices*. Some of the ideas included:

- Link education funding directly to results obtained;
- Reduce the number of school boards;
- Streamline system administration;
- Increase the size of school jurisdictions;
- Share programs, services, and facilities among school jurisdictions or with other agencies;
- Make better and more flexible use of school facilities by building and renovating schools at less cost, closing small schools, sharing school buildings among school boards, using schools to provide other services, providing education programs in facilities other than schools.

"We must look, over the longer term, at making fundamental changes to the way our education system is organized and to the way we deliver education in this province." Halvar Jonson, Minister of Education, March, 1993.

Many comments were made about the roles and responsibilities of school boards, the provincial government, and education organizations. The participants felt it important to have clearly defined roles and to outline the freedom of school boards to make decisions. Suggestions included:

- the present fiscal situation provides a chance to make fundamental changes in education rather than just small changes;
- reduce the number of school boards through amalgamation, regional divisions;
- school boards should be accountable for results achieved with funds;
- changes in legislation would be needed to restructure the system and change the way programs are delivered.

Participants put forward suggestions on how to provide education programs more efficiently and effectively. These included:

- year-round education;
- better use of technology and distance education;
- reducing or eliminating regulations and process requirements;
- streamlining curriculum change;
- more partnerships with the private sector;
- different staffing patterns in the schools;
- better coordination among various government departments of programs and services delivered to children;
- improving programs for those who do not plan to pursue post-secondary studies.

Strengthening Parent Choice & Involvement

The School Act now provides for school councils to be formed at each school so that parents can play a broad role in advising the school and the school board on any matter related to the school. To date, the roles of most school councils have been somewhat limited to fund-raising activities, finding parent volunteers to assist in the school, or providing supervision at social events. Parents are now requesting a greater role than before in decisions made about the education of their children.

The present legislation allows school boards to delegate authority to school councils in a number of areas but to a large extent this has not happened. Legislation would have to be changed to ensure greater involvement occurs in more significant areas. If changes were to be made, school boards would be required to develop policy to outline how the board would consult with and delegate authority to school councils regarding:

- the aims, objectives, and evaluation of the school program;
- continued operation or closing of the schools;
- the rules which determine how finances are allocated among schools and between schools and central administration;
- input into the development of school policies, budget, procedures, and rules;
- how educational services are provided in the schools including special needs programming;

- details concerning how the Programs of Study will be implemented in the schools;
- developing rules for school enrollment, attendance boundaries, and community use of schools;
- coordinating services to families of school children.

New Types of Schools

Two new types of schools are being formed in some countries to allow parents greater choice in educational programming and to better meet the needs of children: Contract Schools and Charter Schools.

Contract Schools are formed within a school jurisdiction and offer specialized programs to students. With open attendance boundaries, students from across the jurisdiction can attend the schools. Increased involvement of parents, particularly in determining programming, is necessary. Parent Councils could, under the auspices of a contract with the school jurisdiction, have significant authority to operate the school.

Charter Schools could report directly to the provincial Department of Education and receive all of their funding from the government. Funds would be supplied from an envelope of funding which would include the existing grant programs and a requisition against the student's home school district. This funding envelope would contain sufficient funds to cover operating and capital costs for the Charter Schools. These schools would be governed by an individual board, composed of teachers and parents, which would approve policy, develop annual budgets, ensure appropriate results, and engage staff. Typically, these schools would offer the basic education program. However, a set of specialized courses and the use of particular teaching methods to help students learn would make each school unique. A Charter School, regardless of the area in which it is located, would be open to all students across the province.

Enhanced Partnerships

Partnerships between school systems or schools and local business and industry have proven to be highly successful. Enhanced partnerships, under a new definition of basic education (i.e., Career Preparation Program), could be extremely useful for providing students with enhanced job skills. Business and industry could be contracted to provide training to students in a variety of career areas. Teachers would work with the business and industry partners to coordinate in-school and worksite program offerings and to evaluate student progress. Apprenticeship training would be a formal part of this partnership arrangement.

QUESTIONS

4.1 What are the barriers to change in education?

4.2 In which key areas do you think changes in the delivery of education should be made immediately, in the short term, and in the long term?

4.3 What new and/or innovative ideas would you suggest for changing the delivery of education in the province?

4.4 What role do you see for technology in education?

4.5 How do you envision education being delivered in the future?

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